Session 1:

Introduction to VA TMS for all Administrators and Help Desk and Reports Managers

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

April 2014

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1.0 About This Training

1.1 *Training Purpose*

The purpose of the VA TMS Administrators Role-Based Training Session 1: Introduction to VA TMS for All Administrators and Help Desk and Reports Managers is to teach the concepts and key terminology associated with the VA TMS.

1.2 *Target Audience*

This session is a requirement for the following target audience:

- Help Desk (as stand-alone training)
- Reports Managers (as stand-alone training)
- Assignment Managers
- Scheduling Managers
- Registration Managers
- Domain Managers
- Learning Managers
- Item Managers
- AP Managers

1.3 *Training Length*

This training will run for approximately 3.5 hours. Brief breaks will be given.

1.4 *Participant Guide*

This Participant Guide contains all key content presented in this training, including PowerPoint slides with room for taking notes, activities, and demonstrations for each lesson.

The Participant Guide is divided into two sections:

- About This Training
- Training Content

NOTE: Print a hardcopy of this Participant Guide to use during training. You will need to reference the steps for all demonstrations and activities in this guide while completing steps in the VA TMS.

1.4.1 Participant Guide Icons

Icons	Description
	This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS.
	This icon indicates that participants will complete an activity.
	This icon indicates that there is a job aid available for the task.

1.5 *Participant Preparation and Guidelines*

1.5.1 Requirements

Participants must complete the following for this training:

- Register for training through the VA TMS.

- Print a hardcopy of this Participant Guide for use during the training. It will be difficult to access electronically during training.

1.5.2 Demonstrations and System Practice Activities in VA TMS

During this training, you will observe instructor demonstrations and complete system practice activities within the VA TMS. These demos and activities will allow you to study and apply what you've learned about the features, functions, and processes critical to your role within the VA TMS. The steps for each demonstration and system practice activity have been provided in this guide so you can follow-along. You may also want to reference these steps after the training.

1.5.3 Virtual Instructor-Led Training Guidelines

This training will be delivered as a Virtual Instructor-Led Training (VILT) using a Web conferencing software program. You will need a computer and phone with speakers or headset in order to participate in this training. Follow the guidelines below to ensure the best training experience:

- Print a hardcopy of the Participant Guide for use during training.

- Be sure to log in to the Web conferencing software and dial in to the conference line 5 – 10 minutes early.

- Mute your phone line for the duration of the training session unless otherwise instructed.

- Use the chat feature for any questions during the session.

- The instructor may be able to answer your question immediately. Otherwise, he or she will answer at the end of the training, or send an e-mail afterward.

1.6 *VA TMS Administrators Role-Based Training Sessions and Target Audiences*

The table below includes a list of all training sessions in this training series, along with the target audience.

Session	Required for	Recommended for
Session 1: Introduction to VA TMS for All Administrators and Help Desk and Reports Managers	• Help Desk (as stand-alone training • Reports Managers (as stand-alone training) • Assignment Managers • Scheduling Managers • Registration Managers • Domain Managers • Learning Managers • Item Managers • AP Managers	n/a
Session 2: VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers	• Assignment Managers • Scheduling Managers • Registration Managers	• Domain Managers • Learning Managers • Item Managers • AP Managers
Sessions 3–5: VA TMS Training for Domain Managers, Learning Managers, and Item Managers	• Domain Managers • Learning Managers • Item Managers	n/a

NOTE: Sessions 6-10 are advanced topics that are optional for managers who already have experience using the VA TMS.
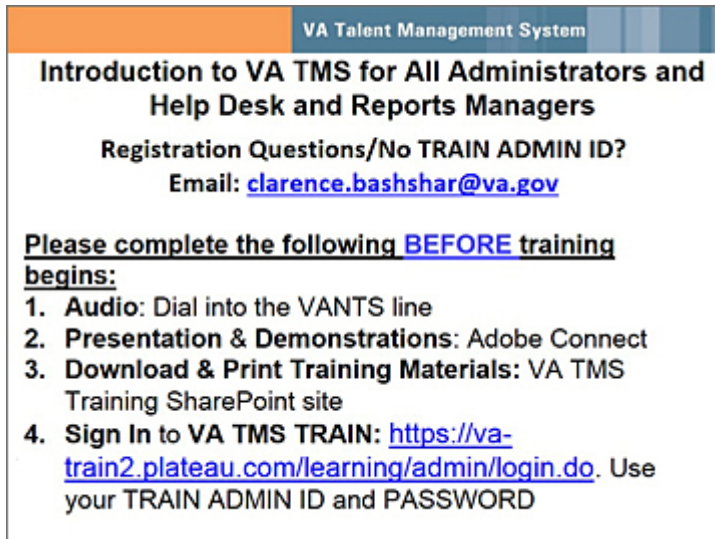
1.7 VA TMS Functions and Associated Roles

NOTE: Gray columns indicate add-on roles; white columns indicate stand-alone roles.

VA TMS Admin Function	LM	DM	IM	RM	SM	AM	APM	HD	PR	QEM	CM	CIM	HR	RPT	AHN	PM	COM	ACM	ACIM	MSE	MSEHD
Unlock User Accounts	X							X	X												
Reset User Passwords	X							X	X												
Change Supervisors for a group of Users	X																				
Proxy into Users accounts	X							X													
Add/Remove Items to/from Learning Plan	X					X															
Add/Remove Curricula Assignments	X					X															
Record Item/External Event/Scheduled Offerings	X			X																	
Edit/Delete Recorded Learning Events	X			X																	
Merge User Records		X																			
Add/Edit Items	X		X																		
Add/Edit Curricula	X		X																		
Send Notifications	X														X						
Add/Edit Scheduled Offerings	X				X																
Register Users into a Scheduled Offerings	X			X	X																
Edit User's Registration in Scheduled Offering	X			X	X																
Assign/Remove Competency Profiles to/from Users											X										
Assign/Remove Competencies to/from Users											X										
Manage Administrator Accounts		X																			
Add/Edit/Copy/Delete Assignment Profiles							X														
Edit User Preferred Accreditations	X							X										X			
Edit User Occupational Categories	X							X										X			
Add/Edit/Delete Competencies											X										
Add/Remove Competencies from Items												X									
Add/Edit/Delte Competency Profiles											X										
Enter/Delete Competency Assessments for Users	X			X		X					X										
Add/Edit/Delete Questions										X											
Add/Edit/Delete Exam Objects										X											
Assign/Remove Questions to/from Exam Objects										X											
Add Questionnaire/Surveys										X											
Unassign a Survey from Users	X																				
Edit Organization Dashboard Ownership		X																			
Add/Edit Accreditations																		X			
Apply Accreditations to Items																		X	X		
View sensitive information on Users Records													X								
Create and Manage Communities																	X				
Run various Standard and Custom Reports	X		X	X	X	X							X	X							
View Self Enrolled User	X					X			X											X	X
Validate Self Enrolled User																				X	
Bookmark Available Entities	X		X	X	X	X		X													
Download Search Results	X		X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X

2.0 Training Content

2.1 *Welcome*
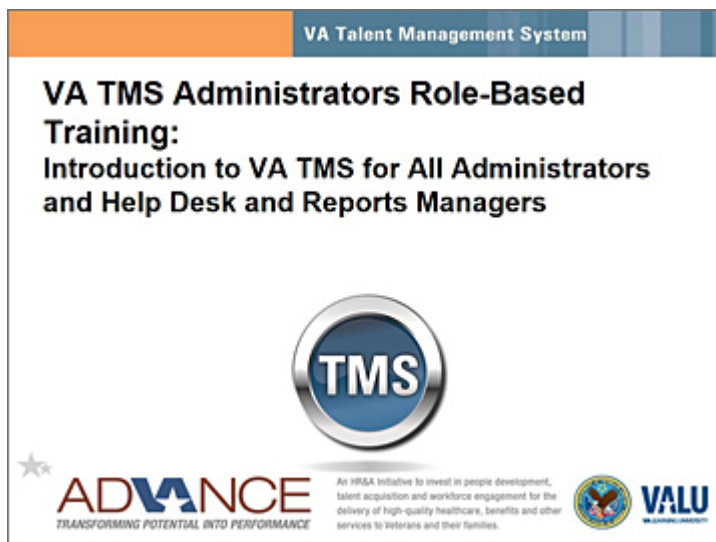
Slide 1: Session Preparation

Notes:

Slide 2: VA TMS Administrators Role-Based Training: Introduction to VA TMS for Administrators and Help Desk and Report Managers

Notes:

Slide 3: Agenda

Notes:

Session 4: Session Objectives
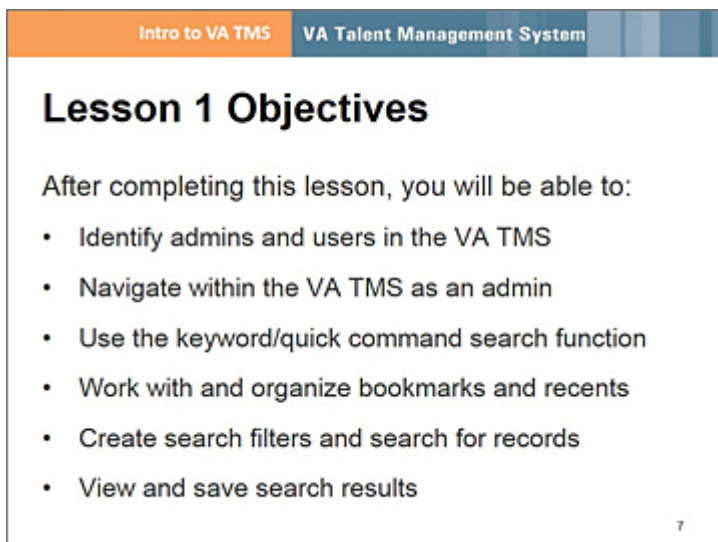
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Slide 5: Introductions

2.2 Lesson 1: General Guidelines: Access, Navigation, and Searching
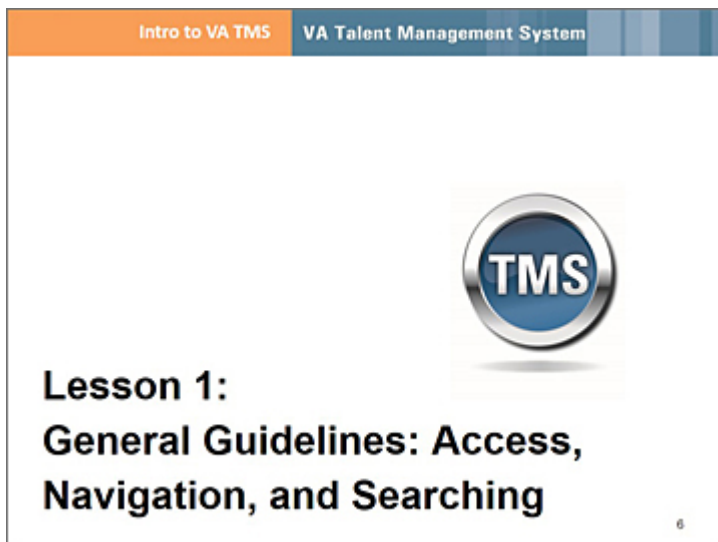
Notes:

Slide 6: Lesson 1: General Guidelines: Access, Navigation, and Searching

Notes:

Slide 7: Lesson 1 Objectives

Slide 8: Introduction to the System
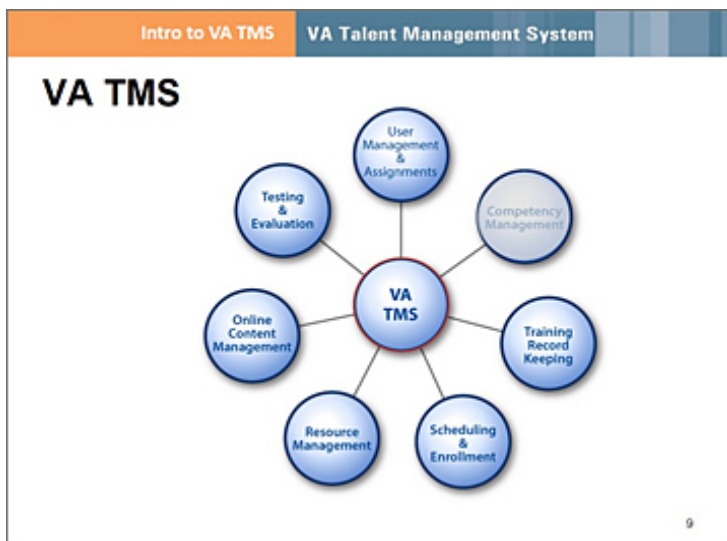
Notes:

Slide 9: VA TMS

Notes:

Slide 10: VA TMS User
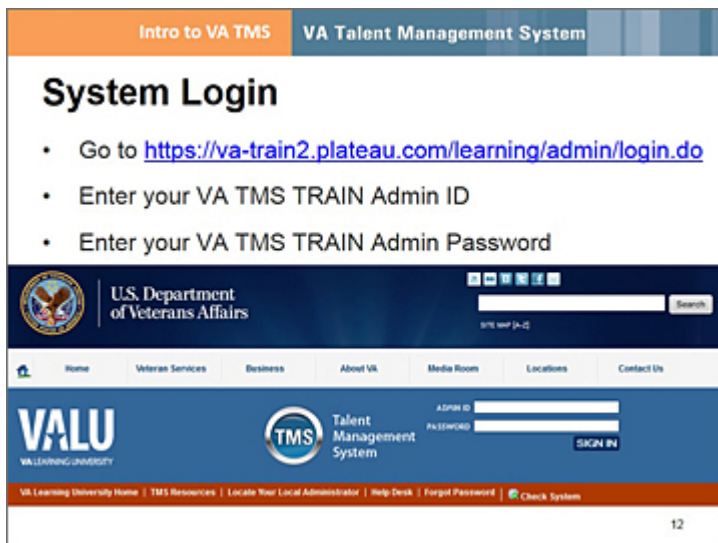
Notes:

Slide 11: VA TMS Admin

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Slide 12: System Login

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Slide 13: Demonstration: Introduction to the VA TMS

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Demonstration: Introduction to the VA TMS

1. Enter the **URL** into your browser and press the **Enter** key or select **Go**. The VA TMS login screen displays.

2. Enter your **Admin ID** and **password**.

3. Press **Enter** or select **Sign In**. The VA TMS admin home page displays.

4. Discuss each of the following VA TMS features.

Admin Home Page Layout

There are four main sections of the admin home page:

1. **Interface Tabs:** Provide access to the different VA TMS interfaces

   - Select **Home** to access your user account interface

   - Select **My Employees** to access your supervisor interface and manage your subordinates

   - Select **Organization** to access to your organization owner interface and explore data (such as view item completions, learning projections, curriculum status, and registration status for a respective organization)

   - Select **Admin** to access your administrator account interface

2. **Main Menu:** Contains buttons to the primary functional areas in the VA TMS such as Users, Performance, Learning, etc. **NOTE:** Your functional area buttons may differ depending on the workflows and roles you are associated with. When a button is selected, its respective available options are displayed in the left menu frame.

3. **Welcome Area:** Includes relevant VA TMS updates and announcements

4. **Quick Links:** Allows easy access to commonly used functions

Check System

1. Select the **Check System** link in the upper right-hand corner of your admin home page to make sure your system meets the minimum requirements to run the VA TMS.

Personalize Your Admin Experience—Configurable Home Page

1. In the continuing effort to provide an application that meets each administrator's unique needs, the administrator Home page is configurable, including a new page layout option. Quick Links are now available from the Home page, along with a configurable Welcome area that can contain any information that needs to be communicated to administrators.

2. Admins can configure the layout for their Home pages using the Choose a Different Layout icon in the upper right to rearrange the two areas, Welcome and Quick Links. The VA TMS provides admins with six different layout configuration options. Additionally, the slide bar between the two areas can be moved to adjust the size of each area.

Quick Links

1. Quick links were traditionally predefined based on commonly used functions within the system; however, any command available from the Search textbox can be configured to display in the Quick Links area, giving you access to whatever you do most.

2. Navigate to the **System Admin > Configuration > Quick Links Configuration** section to configure the Quick Links. After you make these quick links available (defaulted), you can choose to show or hide quick links on the Home page. This allows you to customize your own page to show the quick links that you most commonly work with.

3. The Home Page shows the quick links that are available. Start the process by selecting **Manage Quick Links** (pencil icon), which allows you to add or remove or move existing links and groups from the default configuration and to create new groups.

4. Additionally, Quick Links can be configured into groups that allow larger processes to be defined and accessed from within one area. This allows for the processes that are defined within the organization to be followed, allowing work to be done based on internal process, rather than following prescribed processes. Create Online Course and Create Instructor-Led Course are examples of groups that have been created.

5. Using the Manage Quick Links feature (**Home Page > Quick Links > edit** icon), admins can select from a list of available commands and add them to the list of Selected commands.

6. The quick links can be defined on a global level and then personalized by every admin, always following any assigned security permissions. The definition for each selected command is label driven.

Guided Mode

1. Typically, the purpose of using the guided mode is to provide less-experienced administrators with a guided process for completing routine, multi-step actions. The admin can select **Guide Me** on any group process and access that process from anywhere within the application. This allows the process to follow the admin and will only display once a guided mode has been initiated.

2. When you select the **Preferences** icon (blue spoked wheel) and check the **Enable Guide Me Mode** checkbox in the General Settings area, then the system places another Enable Guide Me Mode checkbox in each administrator's preferences.

3. By selecting the **Enable Guide Me Mode** checkbox for your preferences, the system allows you to select **Use Guided Mode** when you select a group of quick links on your Home page.

Intro to VA TMS | VA Talent Management System

Activity #1: Introduction to the VA TMS

System Practice

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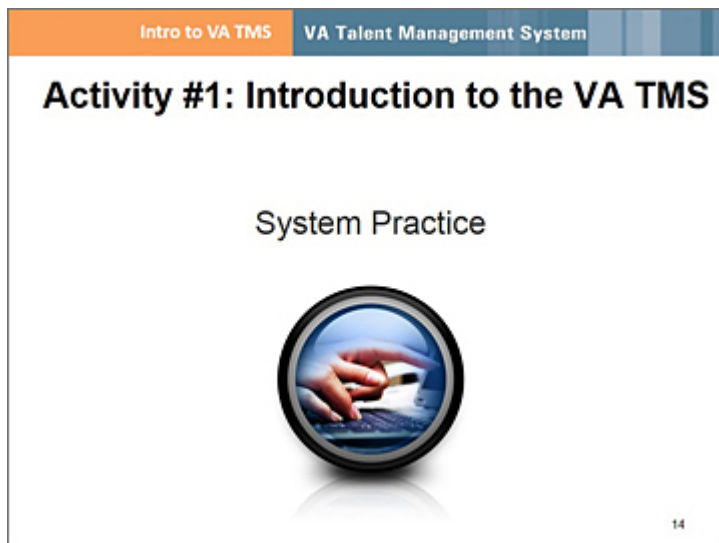
Notes:

Slide 14: Activity #1: Navigating the VA TMS

Activity #1: Navigating the VA TMS

1. Log in to the VA TMS as an administrator.

2. Select **Home** to access your user home page.

3. Select **Admin** to access your admin home page.

4. Check your system to make sure it meets the minimum requirements for VA TMS.

5. Reconfigure your admin home page by selecting the **Choose a Different Layout** icon and selecting a new layout. Select **Save**.

6. Return your home page to its original configuration.

7. Use the **slide bar** to change the size of the Welcome and Quick Links areas.

8. Select the **Manage Quick Links** icon.

9. Add a Quick Link to your home page.

10. Select the **Preferences** icon.

11. Make sure **Enable Guide Me** mode is checked.

Slide 15: Bookmarks and Recents

Notes:

Slide 16: Recommended Next

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Slide 17: Cross Entity Linking

Notes:

Slide 18: Record Layout Consolidation
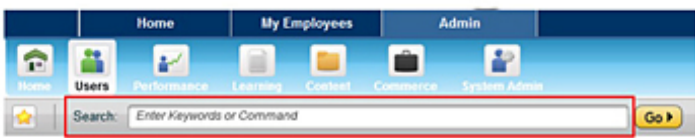
Notes:

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Slide 19: Searching

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Slide 20: Search Textbox

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Intro to VA TMS | **VA Talent Management System**

Keyword Searches

Use keyword searches to locate a record based on text that appears in one of the common fields for that record, such as:

- Title or description fields of items
- Curriculum
- Scheduled offerings
- Etc.

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Slide 21: Keyword Searches

Notes:

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Quick Command Searches

- Use quick command searches to locate a common actions.
- Type an action verb (e.g., "Add") followed by the record that you want to act on (e.g., "user").
- As you start typing, the system displays the commands that are available (i.e., type-ahead search).

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Slide 22: Quick Command Searches

Notes:

Single Searches

- Entering an entity name highlights the "reserved" word to show the admin that the VA TMS has recognized it (e.g., Item).

- Adding more terms enables a search on the entity.

Slide 23:Single Searches

Notes:

Multiple Searches

- Entering non-entity names or commands executes a multiple entity search.

- The search loops through entities in the system and searches them all for the entered value.

- You can pause and resume the search at any time.

Slide 24: Multiple Searches

Notes:

Notes:

Slide 25: Adding/Removing Search Filters

Notes:

Slide 26: Saving Individual Searches

Notes:

Slide 27: Demonstration: Searching

Demonstration: Searching

To save a search:

1. Select **Learning > Items**.
2. From the Items search page, select **Save As**.
3. The system prompts you for an ID for your saved search and a brief description of the search.
4. Enter an ID with an intuitive description to make referencing it in the future easier.
5. Select **Submit**.

To access your saved searches:

1. Select **Saved Searches** at the upper right corner of the content frame.
2. Select the search you wish to conduct.
3. The selected search screen displays. The saved search ID and description are displayed at the top.

To add or remove the organization search filter:

1. Navigate to **Users > Users.**
2. If necessary, select **Add/Remove Criteria** to add the Organizations search criteria to the search screen. **NOTE:** Search criteria added to your search window will remain until you remove them.
3. The Search Criteria pop-up window displays.
4. Select the **Organizations** checkbox.
5. Choose **Select**.
6. The Organizations criteria displays on the Users search screen.
7. To create the filter on the criteria, select the Organizations **Filter by Criteria** icon.
8. The **Organizations Filter by Users** screen displays.
9. Enter a search value for an organization criterion.
10. Select **Search** to display your search results.
11. Select the checkbox(es) to select your choice(s) from the search results.
12. Select **Add to Filter**.
13. Your selected criteria will be displayed in the Filter.
14. Confirm that your selection(s) are correct.
15. Select **Submit Filter**.

16. You are returned to your original search screen. You see that the organization search attribute has two (2) criteria selected for this filter.

17. You can modify this filter by selecting the **Filter by Criteria** icon, or you can clear the filter by selecting the **Clear Filter** icon.

Slide 28: Activity #2: Searching

Notes:

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Activity #2: Searching

1. Navigate to **Users > Users.**

2. Select **Contains** for the **User ID** and enter **12** in the text field.

3. Select **Search** to return all users with 12 in their User ID.

4. Navigate to **Users**.

5. Select **Starts With** for **Last Name** and enter **D** in the text field.

6. Navigate to **Users**.

7. Select **Add/Remove Criteria.**

8. Select a new criteria to add.

9. Choose **Select.** The new criteria displays on your User search page.

Slide 29: Knowledge Check

Notes:

Slide 30: Knowledge Check

Notes:

2.3 *Lesson 2: Learning Needs Management Overview*
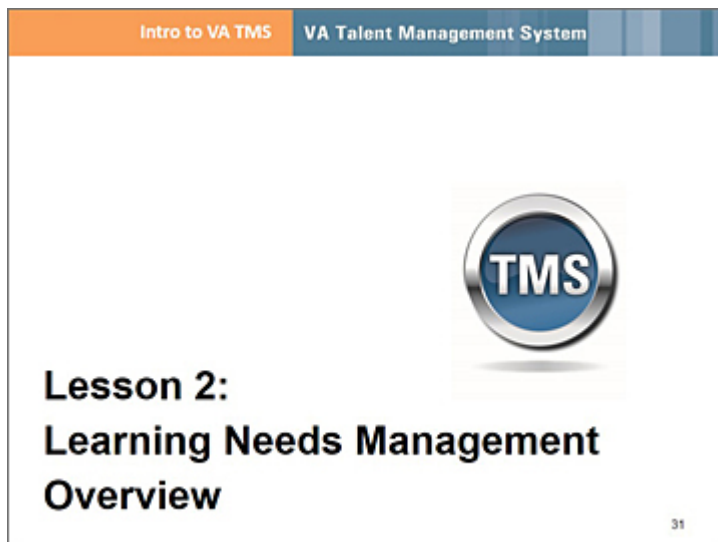
Slide 31: Lesson 2: Learning Needs Management Overview
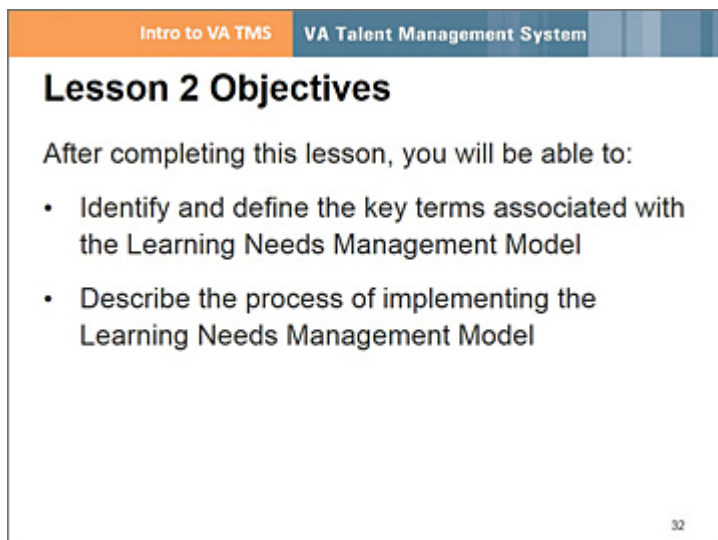
Notes:

Slide 32: Lesson 2 Objectives

Notes:

Intro to VA TMS — **VA Talent Management System**

Learning Needs Management Model

Follow these steps to successfully implement the Learning Needs Management Model:

1. Identify learning needs (outside VA TMS Learning)
2. Add items in VA TMS Learning
3. Add curricula in VA TMS Learning
4. Assign learning events to users
5. Track and record learning events

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Notes:

Slide 33: Learning Needs Management Model

Intro to VA TMS — **VA Talent Management System**

Key Terms

User: Any person for whom a database record has been created, including employees, contractors, and others for whom you wish to maintain learning records and to register for courses

Item: A learning or non-learning unit whose assignment and completion can be tracked

Curriculum: A group of one or more Items that can be assigned to users and have its completion status tracked as a group

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Notes:

Slide 34: Key Terms

Slide 35: Key Terms

Notes:

Slide 36: Knowledge Check

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Notes:

Slide 37: Knowledge Check

2.4 *Lesson 3: Working with User Records*

Slide 38: Lesson 3: Working with User Records
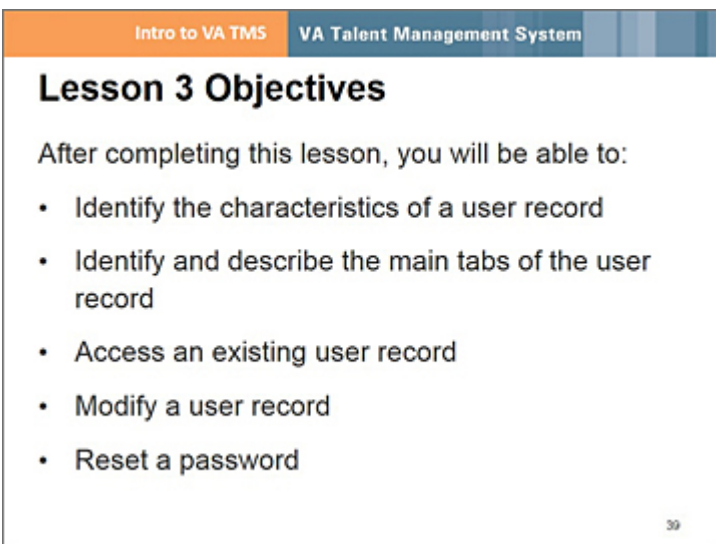
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Slide 39: Lesson 3 Objectives
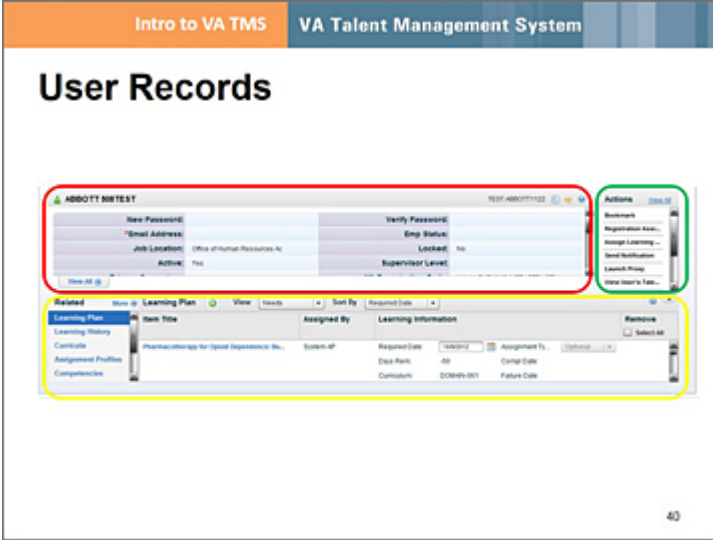
Notes:

Slide 40: User Records

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Slide 41: Demonstration: User Records

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Demonstration: User Records

To locate and view a user record:

1. Navigate to **Users > Users**.

2. Enter your search criteria in the appropriate textboxes.

3. Select **Search**.

4. Locate your user from the search results list.

5. Select a User ID to open the record.

6. Once the user record is displayed, review the three main areas of the record – Core, Related, and Actions.

Core Area

1. The **Core** area contains the basic information of the user record, including the user's name, position, email, organization, supervisor, and job code. To edit any field in this area, simply select in a displayed field and enter text or select a reference value (depending on the field type). You can also view and enter additional information by selecting **View All** located at the bottom left of the Core area. Once expanded, the screen displays several sections where updates can be made: Two important updates that can be made by selecting **View All** include:

   • **Change Password:** To reset a user's password, you must provide the same value in the **New Password** and **Verify Password** fields and then select **Save** (which appears when you begin entering the new password). We recommend that you contact the user to share the new password. There is no automated function in the VA TMS that notifies users that an administrator changed their password. Next time the user logs into the VA TMS, using the password that you provided, the system will force the user to create a new password as a security precaution. Only the user should know the password associated with the user ID. **Note:** Users can also change their own passwords by selecting the **Forgot Password** link on the VA TMS login page. The user's password has to be compliant with the following rules:

   o The password must contain the following types of characters:
       – English lowercase letters.
       – English uppercase letters.
       – Arabic numerals(0,1,2,...9).
       – Non alphanumeric special characters (!@#$%^&*_+-={}|[]:'?,./)
     o Characters cannot be repeated more than twice in a row.
     o The password cannot contain user name (login ID).
     o The password cannot contain user's first name and last name.
     o The new password cannot be same as any of the previous 3 passwords.
     o Password cannot be same as the E-Signature PIN.

o Password cannot contain the words or phrases within the VA Prohibition list
o The length of the password must be between 12 and 16 characters.

- **Unlock User Accounts:** To unlock a user account, select the drop down menu next to **Locked** and select **No.** Help desk managers can also unlock admins accounts by navigating to **Admin > System Admin > Admin Management**. Then search for and select a user. Select the **pencil icon** next to the user's name. **Uncheck** the **Locked** box and select **Apply Changes**. **Note:** Admins cannot unlock their own accounts.

Related Area

1. The **Related** area of the user record contains additional information regarding the user. The related area displays a list of items that administrators use most frequently when interacting with the user record. Select a **Related** tab on the left (e.g.,To-Do List) to display the details on the right.

   - The **To-Do List** tab is used to assign items to a user's To-Do List and manage a user's assigned items.

   - The **Learning History** tab is a transcript of all the items a user has ever taken.

   - The **Curricula** tab is used to assign curricula as well as manage all of the curricula that are assigned to the user, regardless of how the curricula were assigned.

   - The **Assignment Profiles** tab is used to review all of the assignment profiles to which a user belongs.

   - Competencies

   - Competency Profiles

   - The **External Requests** tab is used to add, edit, approve, and withdraw the user's External Requests (a form used when users want to attend a training event that is not managed by the VA TMS).

2. Select **More** to see additional Related tabs. The **More** link displays a list of items that administrators need but use less frequently. The Related and More displays are configured in **System Admin > Configuration > Record Configuration**. Options available under **More** include the options you see <find this info>>. So, in looking at the tabs, which ones would you like to know more about?

   - The **Surveys** tab is used to view information about surveys associated with the user and details for the items that are associated with each survey. When a user completes an item that is associated with a survey, SuccessFactors Administration adds the survey to this tab. When a user completes the survey, SuccessFactors Administration removes the survey from this tab

   - Succession Planning

   - Skills Inventory

- The **Requests** tab is used to view the requests that a user made from the user interface for instructor-led or blended items

- The **Registration** tab is used to view the user's scheduled offering registrations

- The **Account Code** tab is used to select an authorized account code to associate with a user so that the user can purchase items that have a price using the chargeback payment method

- The **Preferences** tab is used to set or change a user's time zone, currency, locale, and locale format options

- The **Phone Numbers** tab is used to create or manage the different phone numbers that are associated with a user

- The **Organization Dashboard** tab is used to manage a user's ownership privileges for dashboards

- The **Online Status** tab is used to review any of the items that 1) are assigned to the user's To-Do List and 2) have online content

- Occupational Category

- Government Reporting

- The **Commerce** tab is used to edit the user's shopping account, billing, and shipping information

- The **Catalog Preview** tab lists all the catalogs that a user can access

- The **Assessments** tab is used to track a user's progress and statistics regarding his or her competencies

- Some items require that users receive approval before they gain access to the item. In these situations, users must request approvals, which administrators can review from the **Approvals** tab

- Accreditation Type

- The **Approval Role** tab is used to associate the user with an approval role so that an administrator can assign the role to the user for an approval process

- The **Alternate Job Codes** tab is used to add and edit alternative job codes (also called secondary job codes) that are associated with a user; you can find a user's primary job code in the Job Code box on the Summary tab (Core area)

Actions Area

1. The **Actions** area of the user record contains links to additional actions that can be taken on the user record, including:

   - **Bookmark**: Add the user to the admin bookmarks

- **Registration Assistant**: Initiates the Registration Assistant tool

- **Assign Learning Needs**: Initiates the User Needs Management tool to enable you to batch assign items and curricula to one or more users

- **Send Notification**: Initiates the ad hoc notification wizard

- **Launch Proxy**: Initiates proxy feature

- **View User's Talent Profile**: Launches the user's talent profile

- **Manage Alternate Supervisors**: Allows you to identify alternate supervisor for user

- Reset User Pin: Resets the user's pin. Typically, you reset a PIN when users forget their current PIN and request a new one. After you reset a PIN, the next time the associated users log in to the user interface, they are prompted to create a new PIN. The PIN they create is subject to the parameters you have set in the Electronic Signatures area (System Admin>Configuration>Global Variables).

- **Learning History Report**: Allows you to generate the Learning History report

Notes:

Slide 42: Activity #3: User Records

Activity #3: User Records

1. Navigate to **Users** menu tab.

2. Search for users whose last names begin with the same letter as your own.

3. Choose a user by selecting the **User ID** link.

4. Select **View All** at the bottom left of the Core area.

5. Change the user's password.

6. Explore the **To-Do List** and **Learning History** sections of the Related area for the user selected.

7. Launch a proxy for the user in the Actions area.

The Job Aid: Add and Edit User Records is available in the VA TMS.

Knowledge Check

The Learning History tab, which is located in the Related area, displays those items a user has completed including the date those items were completed.

a) True
b) False

Slide 43: Knowledge Check

Notes:

Knowledge Check

Which of the following are required fields in the VA TMS user record?

a) User ID
b) Email address
c) Domain
d) Role
e) All of the above

Slide 44: Knowledge Check

Notes:

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Slide 45: Knowledge Check

Notes:

Slide 46: Knowledge Check

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2.5 *Lesson 4: Running, Saving, and Creating Recurring Reports*

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Slide 47: Lesson 4: Running, Saving, and Creating Recurring Reports
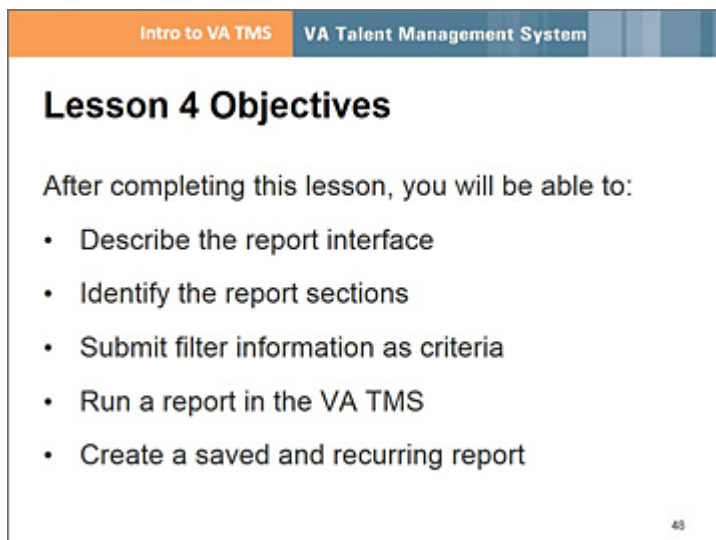
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Slide 48: Lesson 4 Objectives

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Slide 49: Reports Overview

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Slide 50: Demonstration: Reports Overview

Demonstration: Reports Overview

Reports

The most common use of the Reports tab is to run available reports within the system.

1. To find the desired report, browse the provided list under the Reports tab or use the **Search** textbox and **Browse By** options on the left side of the report interface to search for reports by the title or description.

2. To further assist in the search for a desired report, narrow the search results by checking the corresponding checkbox on the left-hand side to select very specific categories of reports.

3. Depending on your security privileges, you may also perform advanced report tasks from the Reports tab, such as changing the description of reports, importing and exporting reports and libraries for customization in Report Designer, and publishing and un-publishing reports.

4. The functions that you are able to perform in the reports section are controlled by report workflows given to you by the system administrator.

Saved Reports

Once you create a saved report, you can access the report and run it without reentering filtering options.

1. Saved reports are located under the Saved Reports tab and are specific to your admin account, meaning that saved reports are not shared among admins in the system.

2. A saved report is very similar to a saved search in the VA TMS—only the admin who created the saved report is able to see it.

Report Jobs

The Report Jobs tab lists the current background report jobs which are automatically running in the background.

1. Jobs are created under this tab when you schedule the report to occur on a recurring basis.

2. On this tab, you can delete jobs from recurring or edit the schedule of when the report should run.

3. Reports that are scheduled to run only once display under **System Admin > Background Jobs**.

Reports Sections

Section 1: Formatting

The top section of the Run Report screen contains the following formatting options:

- Modify the report title, header, and footer

- Determine the report destination (the location where the report engine returns the data). You can return the data to the browser or to a local file. When you select Browser, the report is displayed in the internet browser window. When Local File is selected, you must save the report to a local drive before you are able to open it.

- Determine the report format

Section 2: Criteria

The selected report dictates the criteria displayed at the bottom of the Run Report screen. This section provides all the tools and functionality for searching. Report pages filter the data that the report returns using specific search fields. Many reports, however, also contain the following controls for filtering the data that you want to return:

- **Mask User IDs:** For security reasons, the VA TMS can mask the user IDs so they display as a series of asterisks. Check the checkbox to hide user IDs

- **Case sensitive search:** You can choose to perform a case-sensitive search or a case-insensitive search. Case-sensitive searches return data elements only when the characters and case match. Case-sensitive searches run faster than case-insensitive searches

- **Page Break between Records:** For longer reports, there is an option to insert page breaks between records

- **Filter by Criteria:** Some fields in the report pages contain a Filter by Criteria link. When you select the link, a page opens that contains multiple search fields in which you can select a set of data rather than a single data element. For example, you can return the set of users who are in the job location Washington, DC, rather than entering multiple users in the search field

Filter Information

In this demonstration, we want to run a Learning History Report for all users who report to LMSUser. Specify the supervisor(s) in the user filter and apply that filter as a criterion in order for the report to be dynamic.

1. Access a saved report

2. Select **Launch** from the Action column.

3. Select the **Filter by criteria** icon next to the user criteria.

4. If necessary, select **Add/Remove Criteria** to add the supervisor search filter to the search screen.

5. The Search Criteria pop-up window displays.

6. Select the **Supervisors** checkbox.

7. Select **Select**.

8. The Supervisor search query displays.

9. To create the filter, select the **Filter by criteria** icon.

10. The Create Filter by Supervisor screen displays.

11. If you don't know the supervisor's ID, enter search criteria in the Last Name and First Name textboxes.

12. Select **Search**.

13. Your search results are displayed.

14. Select the **checkbox(es)** to select your choice(s).

15. Select **Add to Filter**. The criteria are added to the filter, located at the top of the window

16. Select **Submit Filter**.

17. You are returned to your original search screen.

18. The supervisor search attribute has one (1) criterion selected for this filter.

19. You can modify this filter by selecting the **Filter by criteria** icon, or you can clear the filter by selecting the **Clear Filter** icon.

20. Select **Submit Criteria** to submit LMSUser as a criterion making the search dynamic.

21. You are returned to the original report screen, with a supervisor submitted as a criterion.

22. Now, if the subordinate assignment changes, the system automatically updates the search filter of this report, and runs a Learning History report on all users who report to LMSUser at the time the report is run.

Run a Report

To run a report:

1. Once logged in to the VA TMS, navigate to the **Reports** menu then select the **Reports** tab.

2. Access the report you wish to run by selecting the **report title** OR use the **Search** textbox to look for reports by title or description, or browse the reports in the provided list. Select the proper category to narrow your search results.

3. Read the provided report descriptions to verify it is the report you want to run.

4. If the report is a member of a report group (reports that run the same query but whose results are grouped differently), select the **expand icon** to the left of the report title to expand the group and see the reports that are part of the group.

5. When you find the report that you wish to run, select its title to open the Run Report form.

6. Complete the **Run Report** form to provide the report with the information that it needs to return the data you wish to display.

7. After formatting and criteria options have been determined, select **Schedule Job**. You can choose to schedule the report to run in one (1) of three (3) ways: as a background job to be run immediately, once at a future time, or on a recurring basis.

8. If you selected **Browser** on the Run Report form, the report displays in a separate browser window. If **Local File** was selected, you must first save the file to a local drive before you are able to open it.

9. Select the **Notify via email upon completion** checkbox if you want an email sent to you when the job is completed. You can also decide to have the report directly emailed to you.

10. Select **Finish** to run the report.

11. Review the report and select **Finish** to return to the Reports tab.

Slide 51: Activity #4: Reports

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Slide 52: Evaluation & Self-Certification Reminder

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Slide 53: Questions?

3.0 Terminology

User	Any person for whom a database record has been created, including employees, contractors, and others for whom you wish to maintain learning records and to register in courses.
Item	An assignable unit whose assignment and completion can be tracked. It may be a learning or non-learning item.
Curriculum	A group of one or more items that can be assigned to users and have its completion status tracked as a group.
To-Do List	A user's participation in the completion of an item or external event. For items, this record contains completion status, date, and other information.
Learning Event	A user's participation in the completion of an item or external event. It also contains the date by which each item should be completed.
Learning History (Completed Work on the User-Side)	A record of all recorded learning events for the user.